

## IT Inventory User Handbook for FY 2007

### Background

Submission of agency information technology (IT) assets is required of *all* state executive agencies by Arizona Revised Statutes by September 30<sup>th</sup> of each year. ARS 41-3504 (A (1(e))) states that GITA is to coordinate a "detailed list of information technology assets owned, leased or employed by this state." Information Services Inventory System (ISIS) is the web application for agencies to report their IT inventories online. Upon request, IT inventories can be kept open for updates throughout the year for perpetual updates. The CIO Council changed the annual IT inventory due date to September 30<sup>th</sup> to enable agencies more time for fiscal year-end processing.

### Purpose of Statewide IT Inventory

The IT inventory is used for a variety of purposes. GITA uses the information to analyze and track agency migration towards target IT technologies. Target technologies are identified under Arizona's Enterprise Architecture on GITA's website at [http://azgita.gov/enterprise\\_architecture/](http://azgita.gov/enterprise_architecture/). Platform and Software Target Technology tables are provided for making hardware and software assessments. Please refer to Statewide Standard S815, Configuration Management for additional details on IT inventory.

IT inventory holdings are tracked in a four-level hierarchical set of categories in a SQLServer database. The highest-level categories are assets (both software and hardware) and custom-developed software applications.

CUSTOM-DEVELOPED SOFTWARE APPLICATIONS - The state is particularly interested in the platforms that applications are running on, which databases are supporting the applications, and the programming tools used for development. In addition, critical applications are of interest due to security concerns. The data elements for Applications are detailed under the *Data Elements* document located among the bulleted instructions at [www.azgita.gov/apps/](http://www.azgita.gov/apps/).

HARDWARE AND SOFTWARE ASSETS - The IT asset inventory is organized into three additional levels: Asset Group, Asset Type and Asset Code. There are six Asset Groups: **End user devices** such as PCs, laptops, printers, projectors, scanners, PDAs, etc.; **Mainframes**; **Minicomputers**; **Servers**; **Software**; and **Telecommunications**. Under each Asset Group, there are several Asset Types called out in detail and enumerated in the *Asset Type & Asset Code* document at [www.azgita.gov/apps/](http://www.azgita.gov/apps/). For example, under the Telecommunications Asset Group, there are *Asset Types* for switches, bridges, hubs, gateways, routers, voice equipment and voice power equipment. Under the Voice Equipment Asset Type are found the following *Asset Codes*: Dial-up, TDM/PCM PBX, Tele-management Systems, Call Center Systems, and Voice Mail Systems. The required data elements for each of these items are listed in the *Data Elements* document also located at the website.

### Getting Started

A username and password is required for access to the GITA online web application supporting IT inventory. An agency may obtain a username and password by contacting the GITA IT Planning Manager at (602) 364-4784 or emailing a request to [ITplanning@azgita.gov](mailto:ITplanning@azgita.gov). The same username and password may be used for both ISIS and PARIS.

An agency can either update their IT holdings manually or perform an upload of an Excel data file in the required format, refer to the *ISIS Required Import File Format* section at [www.azgita.gov/apps/](http://www.azgita.gov/apps/). To manually add data, the user clicks on either the ADD NEW APP or ADD NEW ASSET button, whichever is appropriate. An entry screen with required and optional fields is provided for all data elements. A complete listing of data elements and definitions is provided in the Statewide Standard P800-S815

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Configuration Management, located online at [www.azgita.gov/policies\\_standards/](http://www.azgita.gov/policies_standards/). The website also lists current asset type spellings under *Asset Types & Asset Codes*. Since this is a database used for searches across many agencies, **exact spellings** of products and manufacturers are required. Exact spellings of manufacturers and current software products are found at *Inventory Naming Conventions for Manufacturers*, and *IT Inventory Software Product Asset Codes*. Both of these documents are found under the bullets at [www.azgita.gov/apps/](http://www.azgita.gov/apps/) prior to entering ISIS.

As IT inventory data is rolled over in June of each year, an agency only has to add **updates** to their previous year's holdings. A manual edit is also available, if asset tag numbers have changed. Agencies are discouraged from use of OTHER since it provides no information for database searches. If an agency has a new product or manufacturer, the new name can be added to the database in minutes by either a phone call or email to the IT Planning Manager at (602) 364-4784 or [ITplanning@azgita.gov](mailto:ITplanning@azgita.gov), respectively.

Past year's inventory data can be viewed through use of the SELECT INVENTORY heading in the left hand column. In addition, reports are available by choosing REPORT, then the appropriate report from the pull-down menu. The following **reports** can be generated using Adobe Acrobat:

- Entire Inventory
- All Inventory Hardware
- All Inventory Software
- All Inventory Applications
- Sub-Organizational Asset Summary
- Sub-Organizational Asset Software Summary
- Entire Agency Report
- Complete Sub-Organization Application Inventory

Because IT inventory assets are rolled over from one year to the next, it is highly recommended that agencies begin and end their inventory entry process by printing a report of their existing assets.

### Features of ISIS

The most popular feature of ISIS is the ability to **upload data from other inventory systems**. GITA recognizes that many agencies already maintain IT inventories. In these cases, agencies may download their data from these systems, manipulate the data to meet GITA reporting requirements including naming standards and file format, and then upload their data into ISIS using the upload feature. This feature is found in the left-hand column under UPLOAD and merely requires an email address and a file location of the .csv file. The email address is used to confirm receipt of the file and for any necessary error messages.

Agencies also have the ability to **download their asset data from ISIS**, if they wish. This feature allows agencies to develop custom reports using tools other than those offered by ISIS. Application data is not available for downloading at this time.

Another ISIS feature is the ability to apportion an agency into "**sub-organizations**" allowing each entity to maintain their own portion of the inventory. Also, each sub-organization has the ability to separately upload their specific data. In order to use this feature the agency must appoint an agency administrator to define the sub-organizations as well as assignment of user rights and passwords to the various sub-organizations. Presently, only a handful of agencies make use of this feature.

Administrator rights give the agency the ability, if they choose, to delete the entire hardware and software inventory and reload the data from scratch. This feature eliminates the need for agencies already maintaining an inventory system to reconcile the two systems. GITA will also clear out agency hardware and software assets for the current year, upon request.

### Data Entry and Searching

Data entry is performed either manually or via the upload function mentioned above. An agency has the option of adding, editing or simply viewing existing applications or assets. By using a simple pull-down list, the Asset Group is selected followed by an Asset Type and then an Asset Code to identify each hardware and software asset. Searches of the existing assets are also provided using a Boolean 'and/or' function as part of the VIEW capability.

To edit data, click on the VIEW/EDIT APP or VIEW/EDIT ASSET button. If existing data is being modified, the appropriate item must be viewed first. To search for an existing inventory item, the Asset Group is selected under the GROUP drop-down list.

Once the correct Asset Group is selected, then choose the appropriate Asset Type provided in the drop-down list. Asset Types for each of the above Asset Groups are provided under *IT Asset Types & Asset Codes* at <http://www.azgita.gov/apps/>. Use the asset type search to locate the desired item by manufacturer name or code. Press the edit button, to modify the inventory asset as desired.

Specific **hardware models or software versions** are included in the Asset Code field and are built into the standard naming conventions used in the drop-down lists in the application. The current *IT Manufacturer Naming Conventions* document is located at <http://www.azgita.gov/apps/> and references the spelling of manufacturer names used within the ISIS application. The model and version fields are provided for agencies' own tracking purposes; however, agencies are encouraged to use the latest version of available products.

### Import File Format

To perform a bulk data upload, the fields specified on the *ISIS Required Import File Format* are required in a comma-delimited file (.csv) and the IMPORT file option is chosen. The *ISIS Required Import File Format* is provided at <http://www.azgita.gov/apps/> and lists both optional and mandatory fields with field lengths, types and the required sequence.

### Helpful Hints

Remember to add or update the **mandatory inventory fiscal year** in the last field of the inventory upload or the data may be loaded into the wrong year.

An extra comma, such as one left in an address, can throw off all subsequent fields.

It is suggested that entering the field names in the required order as the first row in the file to be uploaded by ISIS helps to orient the data as well as **prevent EXCEL from deleting the first two columns**, if they happen to be left blank. The required fields are provided in *ISIS Required Import File Format* document at the GITA website.

Remember that unique asset tag numbers or serial numbers are now required on all items in the IT inventory.

Misspelled manufacturer names including extra spaces or with misplaced capital letters can cause rejects. Please consult the current list of manufacturer at *IT Inventory Manufacturer Naming Conventions* located on the GITA website for exact spelling.

For convenience of classification of software products, an alphabetical listing of current software products by ISIS software category is provided at the website under *IT Inventory Software Product Asset Codes*.

Make sure that the file to be uploaded is in a comma-delimited (.csv) format.

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Do not use double quotes (") or the pipe (|) characters in any of the fields of the file to be uploaded.

PC monitors are **not** required in the IT inventory. CPUs are of interest, however. Network computers are defined to be lightweight computer systems that operate exclusively via a network connection, so that they lack secondary storage such as a hard disk drive, booting off the network but running applications locally using their own CPU and RAM. So Network Computers are distinct from terminals, which act as a clients for an application server.

UPS and Generators are found under *Voice Power Equipment Asset Type* and the *Telecommunications Asset Group*.

Fax machines are found under *Voice End User Device Asset Type* and *Telecommunications Asset Group*.

Duplicate items are rejected as well as items other than assets of interest.

### **Contact Us**

If you run into a problem, please contact the IT Planning Manager at (602)364-4784 or send an email to [ITplanning@azgita.gov](mailto:ITplanning@azgita.gov). GITA staff has a lot of experience with this application and with IT inventories and can assist you in resolving any problems.